ATE Survey: Tips for Success from the Field

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We at EvaluATE know that the ATE Survey is not always easy for ATE projects to complete. In order to lighten this burden and encourage efficient and accurate data collection, we have compiled some tips and best practices from ATE PIs and project staff. Thank you to everyone who talked with us and shared your experience for the ATE Survey.

Preparing for the ATE Survey

Start thinking about the ATE Survey at the start of your ATE project and revisit the survey at least once a year. Consider these points to ensure that the necessary information is collected efficiently, accurately, and with minimal disruption.

- **Know the questions** asked on the ATE Survey. A draft of the upcoming survey is available on the Annual Survey page of the EvaluATE website by the end of the calendar year.
- **Create a data crosswalk** between different reporting requirements—such as your evaluation report, your annual report to NSF, and the ATE Survey—to better coordinate efforts and avoid duplicating data collection efforts.
- **Assign roles and responsibilities** to ATE project staff to identify gatekeepers of the data needed for the survey, such as faculty or managers of institutional data (e.g., institutional research or a similar office). Identify who is responsible for collecting data and when.
- **Facilitate shared knowledge about the survey** by discussing survey data needs at the start of the project, and hold periodic meetings to help prevent loss of information due to project staff turnover.
- **Build relationships throughout the year** with data gatekeepers by requesting quarterly meetings with them to better understand and discuss data format, the protocol for requesting data, and the availability of data.
- **Discuss with project staff the utility of data** beyond completing the ATE Survey to identify information that could be disseminated in newsletters or other project reports.

Collecting Data for the ATE Survey

Some data might require tracking throughout the year. Other data may be compiled right before the survey launches.

- **Tap into shared community knowledge**, for example:
  - Consult the ATE Survey FAQs on the EvaluATE website.
  - Ask fellow ATE PIs in EvaluATE's Slack community how they collect or manage data.

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- **Be clear about the reporting timeline of the survey**, which covers the calendar year, January 1 through December 31. This may not necessarily be your grant reporting timeline.
- **Monitor data collection** by checking in with data gatekeepers to help identify and troubleshoot any potential data collection or reporting challenges.
- **Elevate the importance of the survey to stakeholders** to build buy-in. For example, highlight why and how the survey matters to them or how it could be used to inform their work.

Completing the ATE Survey

Remember these tips for when you are completing and submitting the survey.

- **Reach out to EvaluATE** early with questions. We are happy to help! Erika Sturgis can be reached at atesurvey@evalu-ate.org.
- **Complete the survey section by section**, rather than all in one sitting.
- **Save the copy of the completed survey** that is automatically emailed to the PI after successful submission. Make it accessible to the whole project team in case the PI unexpectedly leaves the project.
- **Meet with your ATE project team after survey submission** to reflect on:
    - The survey process and any questions you were unable to answer, to outline strategies for overcoming such challenges next year
    - The information you reported and to consider how it reflects the work of your project, including possible areas of improvement for the coming year

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